



IDW Communiqué



I-MANAGE Data Warehouse: *Your link to DOE's Corporate Business Systems*

December 12, 2005

In This Issue

1. Year End and November Month End Closing
2. Program Office Working Group Update – Field Office Interviews
3. Status of IDW Help Desk Ticket Turnaround
4. An IDW User in Action – Gary Peabody
5. Helpful Tips for Reporting in the IDW

Year End and November Month End Closing

The Standard Accounting and Reporting System (STARS) closed fiscal year 2005 during the weekend of November 19-20. Now that STARS is closed, the IDW has been populated with final ending balance information for FY05. IDW Users can access these FY05 ending balances by selecting SEPADJ1-05 as the accounting period on their reports. In order to view FY06 beginning balance information, IDW Users should select the OCT-06 period (do not use the October adjustment period to report on beginning balances).

In addition to FY05 year end close, November was closed on December 6. Final November numbers were provided in the IDW on December 7. Please remember that closed periods may contain payroll and other accruals that will be reversed in the next month. IDW Users receive an e-mail notification when each period is closed and when month end data is available in the IDW. If you are not receiving these messages and would like to be added to the IDW mailing list, please send an e-mail to IDW@hq.doe.gov with the word “subscribe” in the subject line.

Program Office Working Group Update – Field Office Interviews

The IDW Team is currently conducting field office interviews. These interviews are a natural complement to the program office interviews completed in August and September. A total of 18 field offices were scheduled for interviews. We expect to complete the initial round of meetings and conference calls next week and will begin evaluating the responses. The IDW Team will consolidate this information, compile a list of the top issues, and incorporate actions to address these issues into our project plan. Suggestions received thus far include:

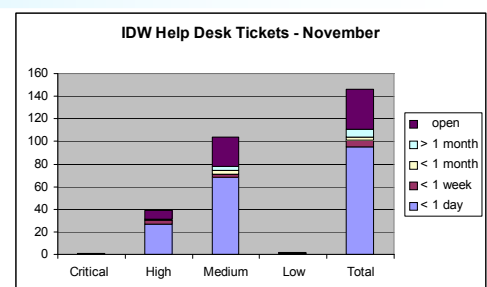
- Create a super user group to share information across the department in order to increase efficiency in utilizing DOE's resources
- Share STARS reports on the IDW portal
- Include more STARS values in the reports, not just Legacy values
- Include more business scenarios in training in order to better understand how the tool can be useful in daily operations
- Provide additional on-site training

The IDW Team looks forward to continuing to help our users – both from the program offices and from the field offices – achieve their reporting needs.

Status of IDW Help Desk Ticket Turnaround

In November, the I-MANAGE Help Desk worked 146 IDW tickets. This number includes tickets carried over from October and new tickets opened in November. Most of these tickets, 69%, were closed in one day or less; 77% of High priority tickets were closed in 4 days or less. Only 35 tickets remained open at month end.

The I-MANAGE Team is proactively meeting the needs of our customers and we look forward to working with users to continue our high standard of service in the future.



An IDW User in Action – Gary Peabody

This is the first in a series of interviews with users exploring how they use the IDW. This month, Gary Peabody from the Chicago field office was interviewed.

Gary began using the IDW more extensively when he began working on the Analysis of the Uncosted Obligations request issued annually by the CFO. Each Office must report its success in meeting certain thresholds of uncosted obligations, therefore the CFO issues a request for this data according to various parameters. In order to fulfill this request, Gary customized the SOOA030 Uncosted and Unpaid Balances report (located on the portal: click the STARS tab, click the Status of Obs. Tab) to generate a new report that met the project's needs. As he began using the IDW to pull and arrange data in a manner that would be meaningful for the CFO, he found that the IDW was easy to use, *"once I got used to it and saw how it worked, it seemed like it was fairly easy to use."* He was able to take Chicago's accounting data to successfully obtain the necessary measures. He was able to use the IDW effectively because it contained the different contract types, and the accounting flex field values and descriptions (such as the budget and reporting code) that he needed. He explains that a key to his success was that the IDW report provided all the parameters necessary for him to *"split out"* the data for his office's Annual Uncosted report. Gary also expressed gratitude towards the help desk. *"One other good thing was the Help Desk. They responded very quickly and came up with an answer that worked really well."*

Look forward to hearing from other IDW Users in future Communiqués. Please contact us if you would like to share your success stories with the IDW User Community.

Helpful Tips for Reporting in the IDW

This month's tip: Parameters

Parameters give you the power to limit your report to just those items of interest to you and your organization. Here are some tips that will help you set parameters for your Viewer reports:

Parameters can be:

- **Limited to one value** (e.g. GL period)
- **One or more values** such as moving values from the Available Values list to the Selected Values list (Note: selecting the Move All button when there are multiple pages of parameters will only select all of the parameters on the current page)
- **Exact values** using search parameters such as "Starts with" or "Contains" (Note: to return all values for this type of parameter, select "Starts with" and leave the text box blank)

When presented with a list of Available Values, you also have a Search feature. The Search feature is used to reduce the number of parameter values displayed in the Available Values list. It has no effect on the values already appearing in the Selected Values list. When using this feature, you can specify Contains, Starts With, Ends With, and Exactly Matches in the Search by drop down list. As an example, suppose you were interested in narrowing a list of Assistant Secretary values to just those values with the word 'Security' somewhere in the title. You would choose Contains and then specify 'Security' for the search. You can also specify whether matching should be case-sensitive.



Targeting Your Data

To add a condition on a field that is not included in your parameter list, contact one of your office's Plus users and ask them to copy the report and add a new parameter. If the report has multiple worksheets, please remember that you will need to add the parameter to all worksheets, as applicable.

IDW Project Information

I-MANAGE Program site: <http://www.mbe.doe.gov/me2-5/i-manage/>

I-MANAGE Program Manager: Warren Huffer, warren.huffer@hq.doe.gov, 301-903-3761

IDW Project Manager: Lajos Grof-Tisza, lajos.grof-tisza@hq.doe.gov, 301-903-1798

To be added to the IDW Communiqué mailing list, please send an email to IDW@hq.doe.gov